Office of Legislative and Intergovernmental Affairs (OLIA) and Office of Inspector General (OIG) Quick Reference Guide

OLIA and OIG Quick Reference Guide

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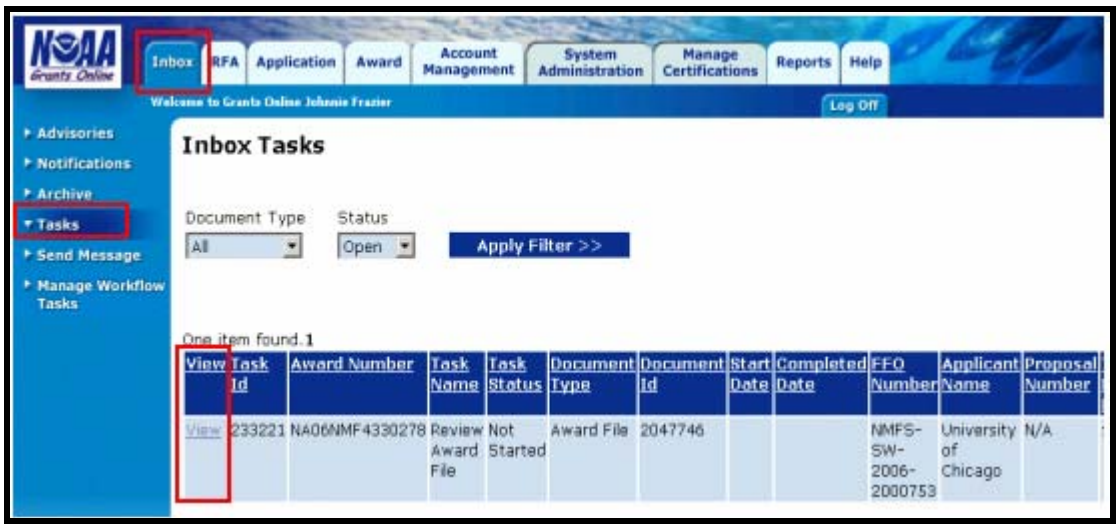
The purpose of this document is to provide OLIA and OIG staff with a step-by-step process for completing the review Award file task (OIG) and the clear Award file task (OLIA)

Completing the Review Award File Task – OIG

Step 1: Log into Grants Online by entering your Username and Password.

Step 2: Select the **Inbox** tab, followed by the **Tasks** link.

Step 3: The following screen is the **Task Inbox** page. Select the **View** link for the **Review Award File** task.



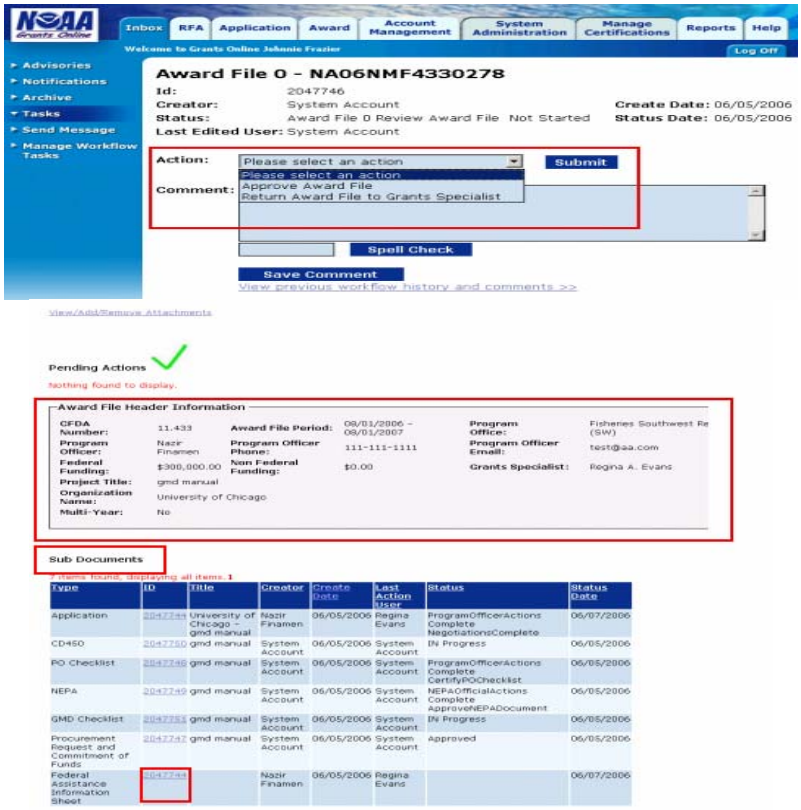
Step 4: The following screen is the **Task Launch** page. From the action drop down menu you may select from the following options:

- **Approve Award File**: This action allows you to approve the **Award** and completes the **Review Award file** task. Upon selecting this action and selecting **Submit**, the task is removed from your inbox.
- **Return Award File to Grants Specialist**: This action allows you to return the Award file to the Grants Specialist for revisions. Select this option if you are not approving the Award file. Be sure to include your explanation(s) for returning the Award file in the COMMENTS field. Please note you must enter and save your comment before you can select an action. Upon selecting this action and selecting **Submit**, the task is removed from your inbox.

Before selecting an action, you may verify the Award information in the **Award File Header Information** section, which includes:

- **Program Office** and **Program Officer**
- **Estimated Federal Funding** and **Non-Federal Funding**
- **Grants Specialist**
- **Organization**
- **Project Title**

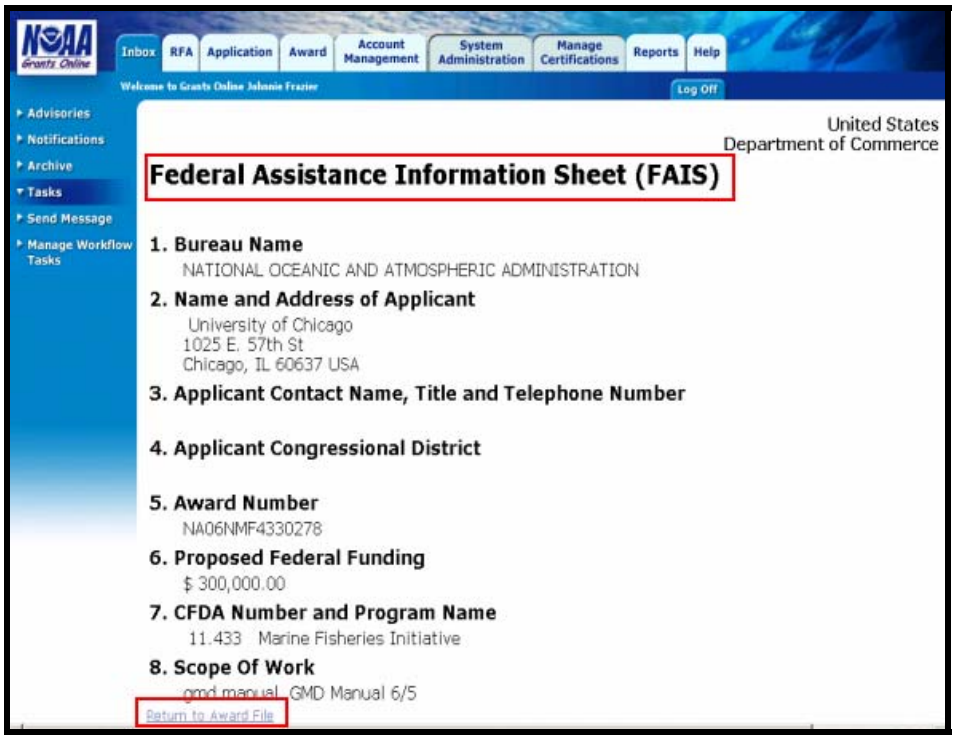
In addition, you may access the **Federal Assistance Information Sheet** by selecting the **Federal Assistance Information Sheet ID** from the **Sub Documents** section.



Step 5: Upon selecting the **Federal Assistance Information Sheet ID** from the **Sub Documents** section (see step 4), the Federal Assistance Information Sheet (FAIS) page is displayed. Review the detailed Award information, which includes:

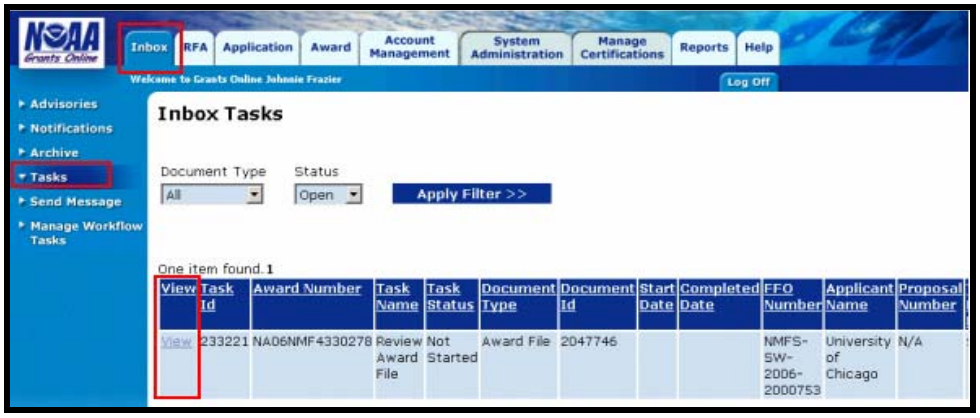
- **Bureau Name**
- **Name and Address of Applicant**
- **Applicant Contact Name, Title and Telephone Number**
- **Applicant Congressional District**
- **Award Number**
- **Proposed Federal Funding**
- **CFDA Number and Program Name**
- **Scope Of Work**

After reviewing the detailed Award information, select the link entitled **Return to Award File** to return to the Award file and the task launch page.



Approving the Award File

Step 1: Upon review of the detailed Award information, to approve the Award file select the **Inbox** tab followed by the **Tasks** link. Select the **View** link for the **Review Award File** task.

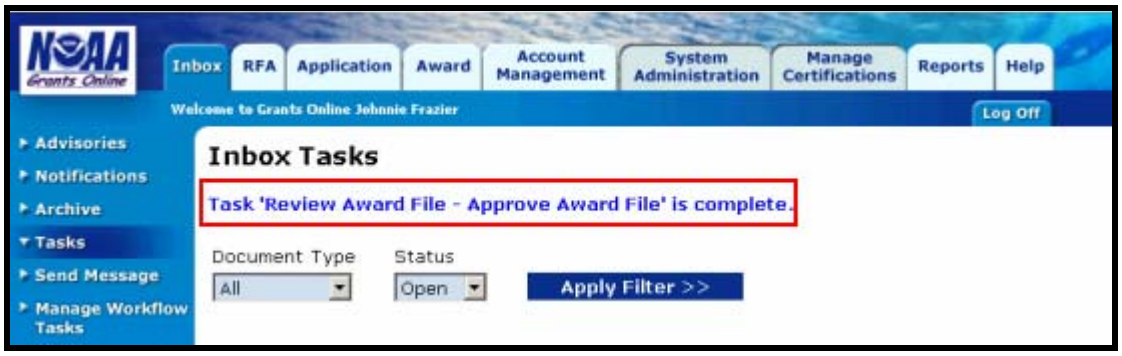


Step 2: The following screen is the **Task Launch** page. From the action drop down menu select **Approve Award File** followed by the **Submit** button. This action completes the task. Please note you may enter comments in the COMMENT field but the comments must be entered and saved before selecting the **Approve Award File** action. To view the previous workflow history and comments select the **View previous workflow and history comments** link (see step 4).

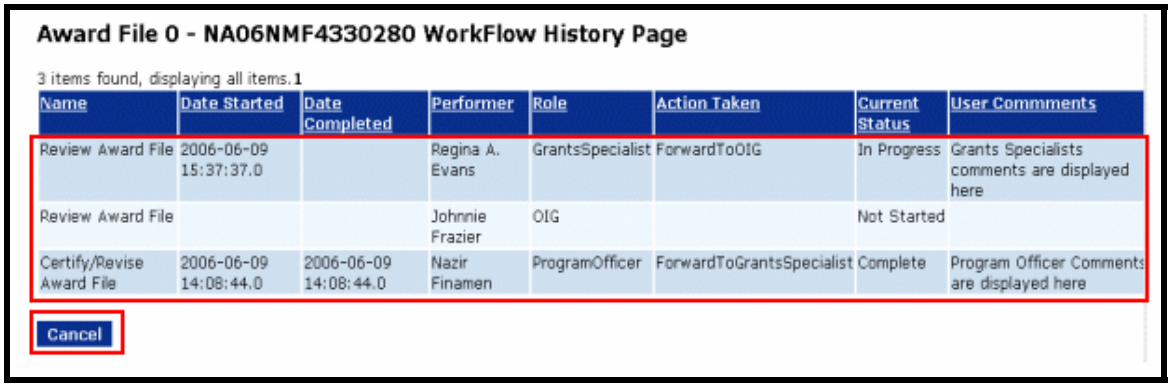
Step 3: Upon selecting the **Approve Award File** action, the following note is displayed:

- **Task "Review Award File – Approve Award File" is complete**

This completes the **Review Award File** task.



Step 4: Upon selecting the **View previous workflow history and comments** link, the **Workflow History** Page is displayed. The workflow history shows current tasks as well completed tasks. For our example below, the workflow indicates the Program Officer forwarded the Award file to the Grants Specialist on June 9, 2006. The Grants Specialist sent the Award File to OIG on June 9, 2006 as well. In addition, any comments made by the users are also listed in the **User Comments** section.



Award File 0 - NA06NMF4330280 WorkFlow History Page

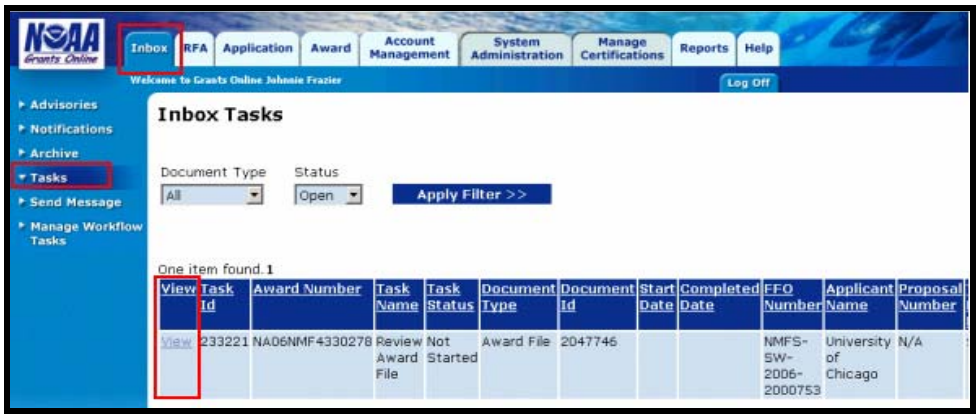
3 items found, displaying all items. 1

Name	Date Started	Date Completed	Performer	Role	Action Taken	Current Status	User Commments
Review Award File	2006-06-09 15:37:37.0		Regina A. Evans	GrantsSpecialist	ForwardToOIG	In Progress	Grants Specialists comments are displayed here
Review Award File			Johnnie Frazier	OIG		Not Started	
Certify/Revise Award File	2006-06-09 14:08:44.0	2006-06-09 14:08:44.0	Nazir Finamen	ProgramOfficer	ForwardToGrantsSpecialist	Complete	Program Officer Comments are displayed here

Cancel

Return Award File to Grants Specialist

Step 1: Upon review of the detailed Award information, to return the Award file to the Grants Specialist without approving it, select the **Inbox** tab followed by the **Tasks** link. Select the **View** link for the **Review Award File** task.

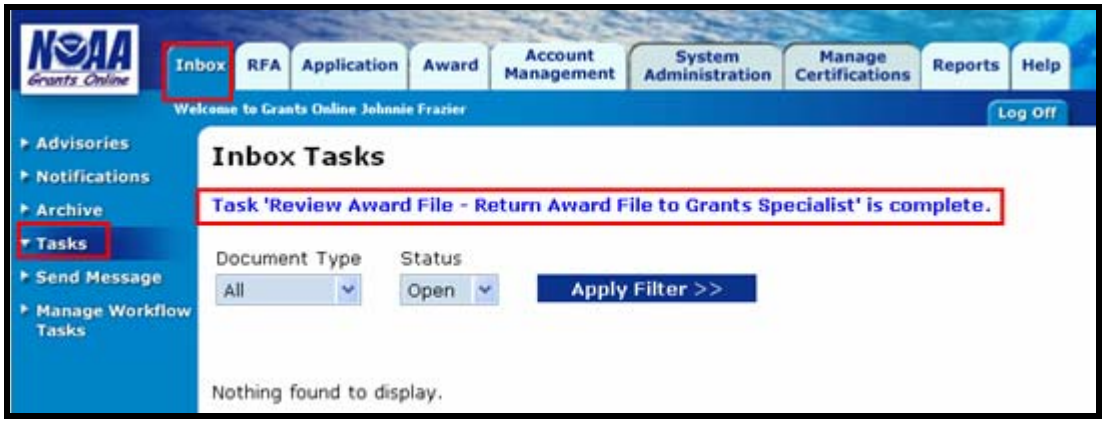


Step 2: The following screen is the **Task Launch** page. From the action drop down menu select **Return Award File to Grants Specialist** followed by the **Submit** button. This action completes the task. Be sure to include your explanation(s) for returning the Award file in the COMMENTS field. Please note you must enter and save your comment before you can select an action. To view the previous workflow history and comments select the **View previous workflow and history comments** link (see step 4).

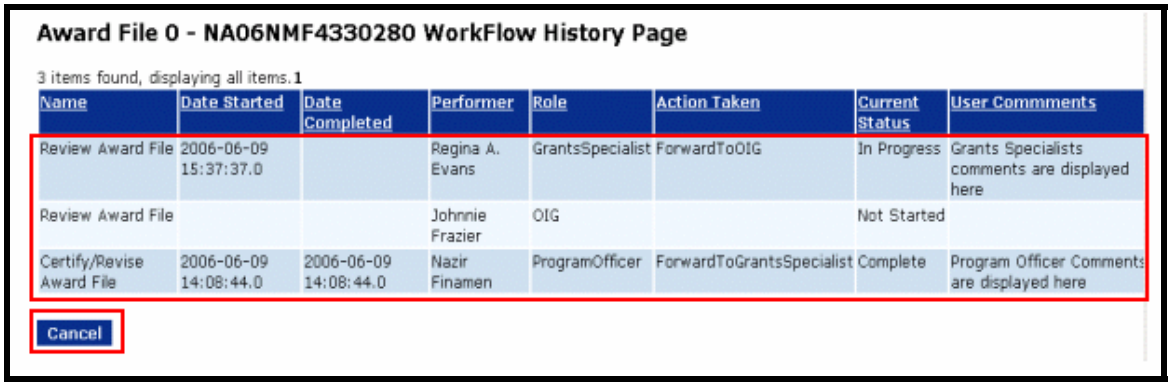
Step 3: Upon selecting the **Return Award File to Grants Specialist** action, the following note is displayed:

- **Task "Review Award File – Return Award File to Grants Specialist" is complete**

This completes the **Review Award File** task.



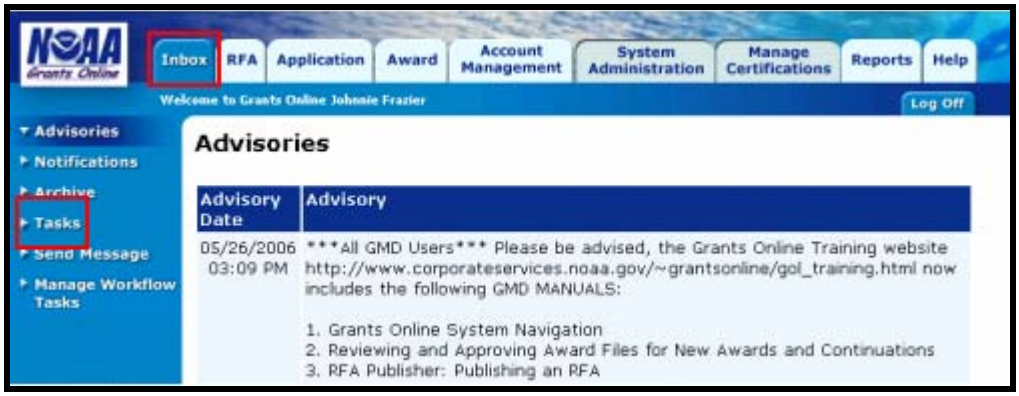
Step 4: Upon selecting the **View previous workflow history and comments** link, the **Workflow History** Page is displayed. The workflow history shows current tasks as well completed tasks. For our example below, the workflow indicates the Program Officer forwarded the Award file to the Grants Specialist on June 9, 2006. The Grants Specialist sent the Award File to OIG on June 9, 2006 as well. In addition, any comments made by the users are also listed in the **User Comments** section.



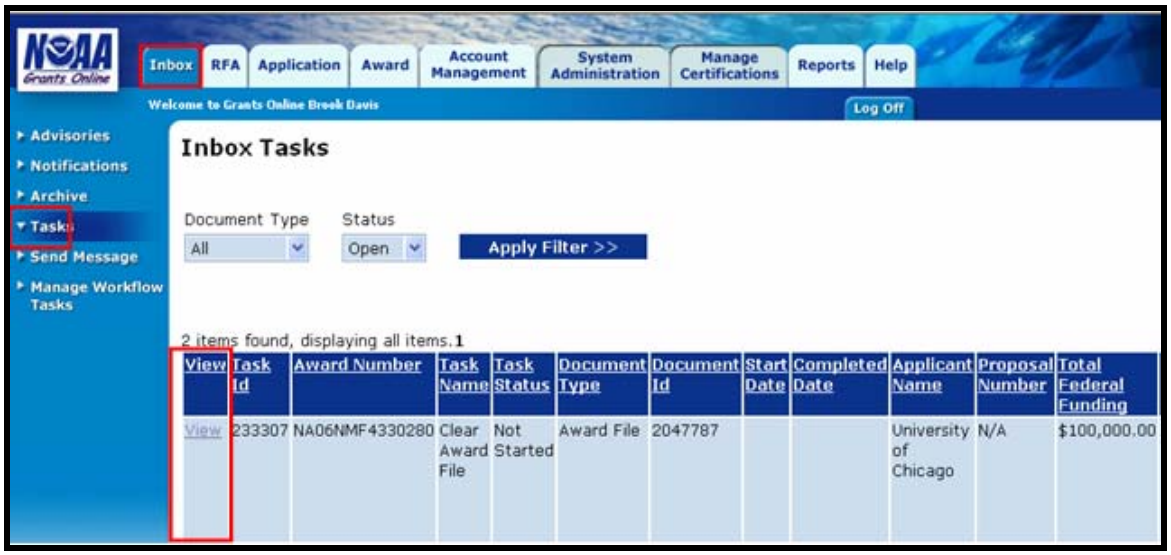
Completing the Clear Award File Task - OLIA

Step 1: Log into Grants Online by entering your Username and Password.

Step 2: Select the **Inbox** tab, followed by the **Tasks** link.



Step 3: The following screen is the **Task Inbox** page. Select the **View** link for the **Clear Award File** task.



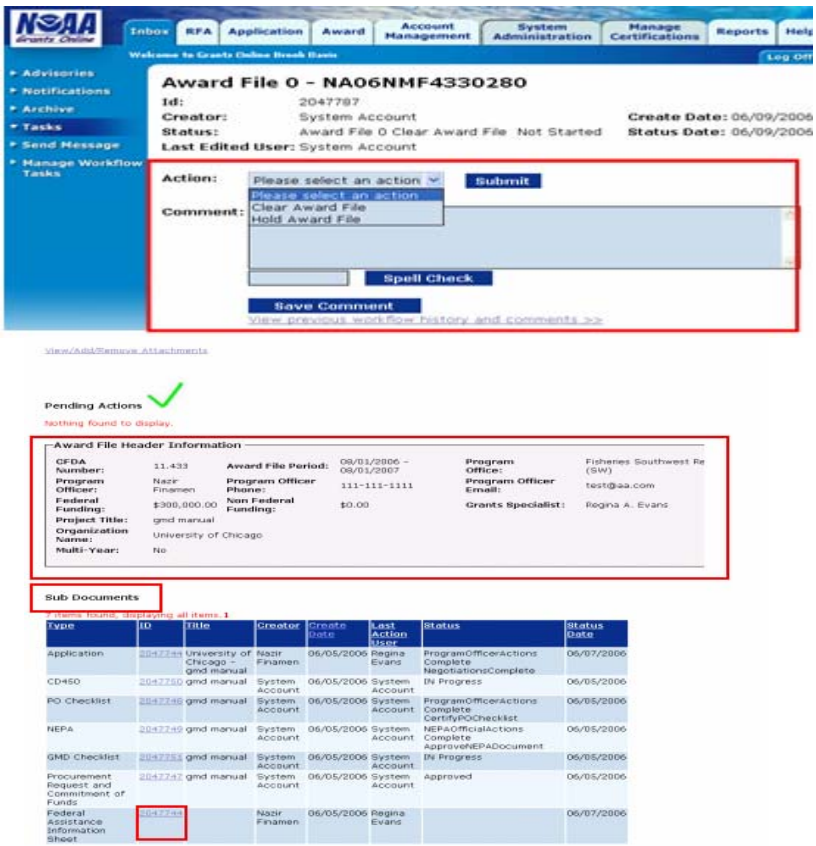
Step 4: The following screen is the **Task Launch** page. From the action drop down menu you may select from the following options:

- **Clear Award File**: This action allows you to approve the **Award** and completes the **Clear Award file** task. Upon selecting this action and selecting **Submit**, the task is removed from your inbox.
- **Hold Award File**: This action allows you to hold the Award file. Select this option if you are not approving the Award file. Be sure to include your explanation(s) for returning the Award file in the COMMENTS field. Please note you must enter and save your comment before you can select an action.

Before selecting an action, you may verify the Award information in the **Award File Header Information** section, which includes:

- **Program Office** and **Program Officer**
- **Estimated Federal Funding** and **Non-Federal Funding**
- **Grants Specialist**
- **Organization**
- **Project Title**

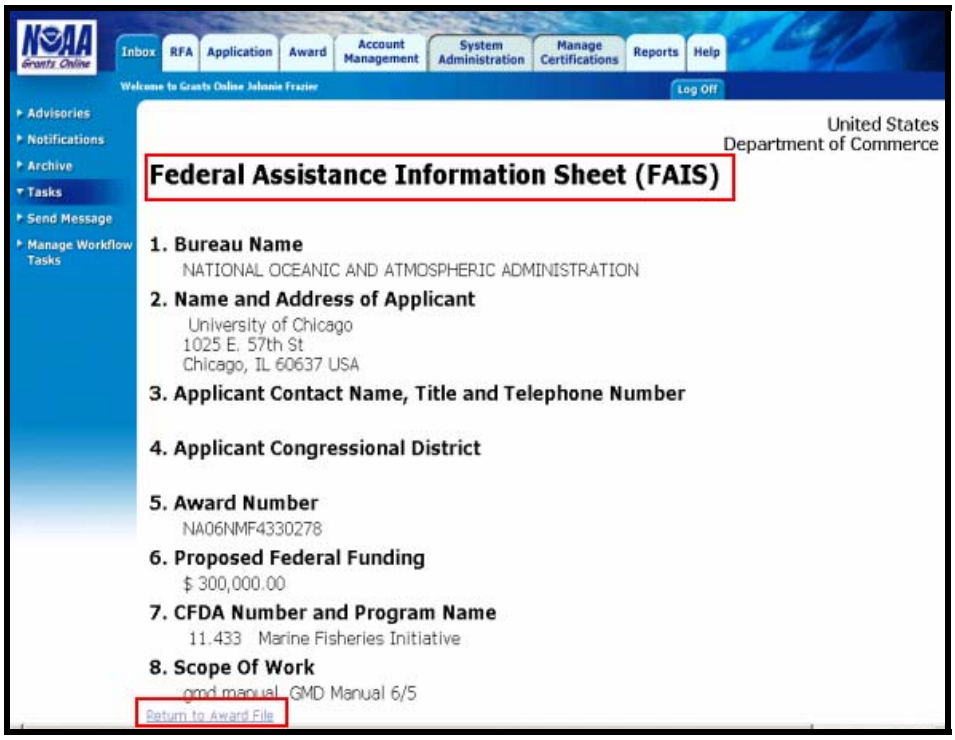
In addition, you may access the **Federal Assistance Information Sheet** by selecting the **Federal Assistance Information Sheet ID** from the **Sub Documents** section.



Step 5: Upon selecting the **Federal Assistance Information Sheet ID** from the **Sub Documents** section (see step 4), the Federal Assistance Information Sheet (FAIS) page is displayed. Review the detailed Award information, which includes:

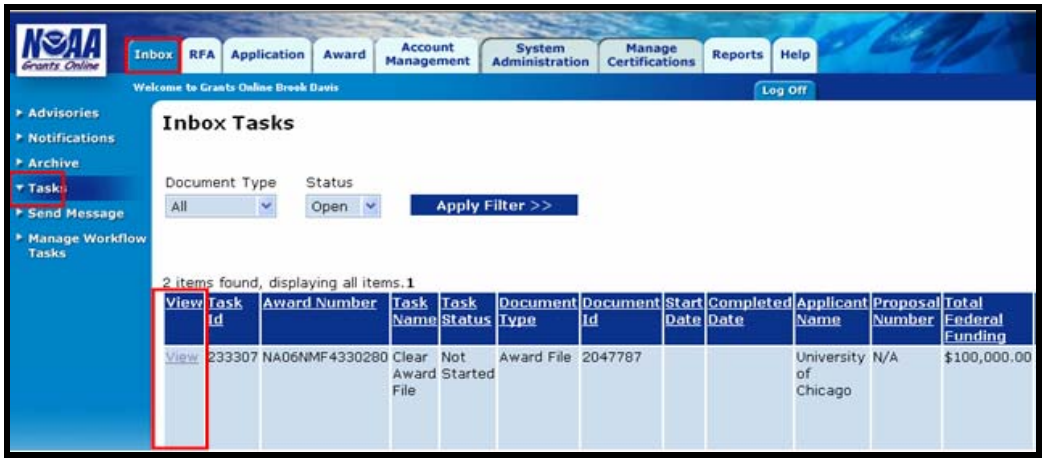
- **Bureau Name**
- **Name and Address of Applicant**
- **Applicant Contact Name, Title and Telephone Number**
- **Applicant Congressional District**
- **Award Number**
- **Proposed Federal Funding**
- **CFDA Number and Program Name**
- **Scope Of Work**

After reviewing the detailed Award information, select the link entitled **Return to Award File** to return to the Award file and the task launch page.

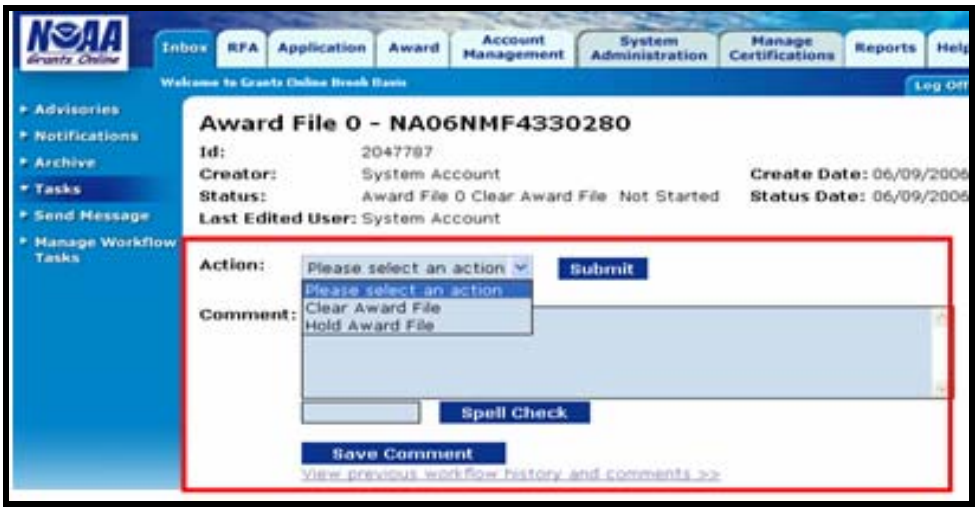


Clearing the Award File

Step 1: Upon review of the detailed Award information, to approve the Award file select the **Inbox** tab followed by the **Tasks** link. Select the **View** link for the **Clear Award File** task.



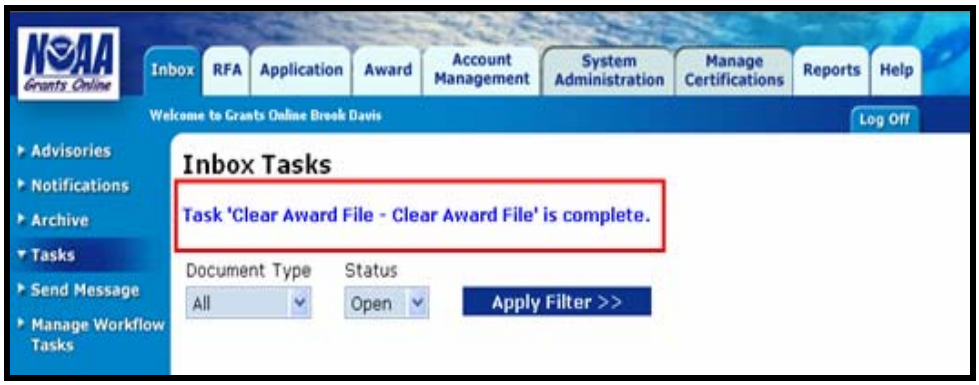
Step 2: The following screen is the **Task Launch** page. From the action drop down menu select **Clear Award File** followed by the **Submit** button. This action completes the task. Please note you may enter comments in the COMMENT field but the comments must be entered and saved before selecting the **Clear Award File** action. To view the previous workflow history and comments select the **View previous workflow and history comments** link (see step 4).



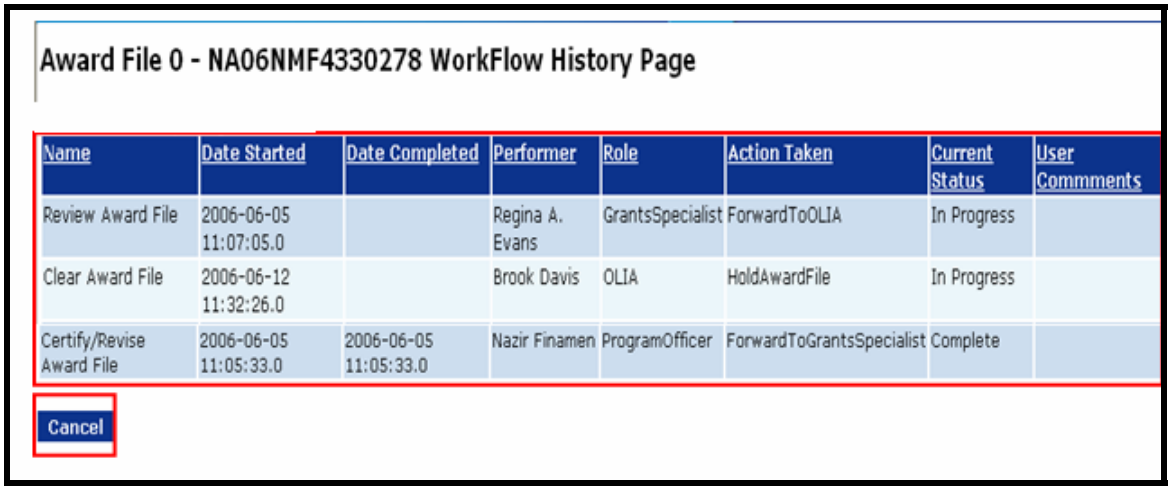
Step 3: Upon selecting the **Clear Award File** action, the following note is displayed:

- **Task "Clear Award File – Clear Award File" is complete**

This completes the **Clear Award File** task.

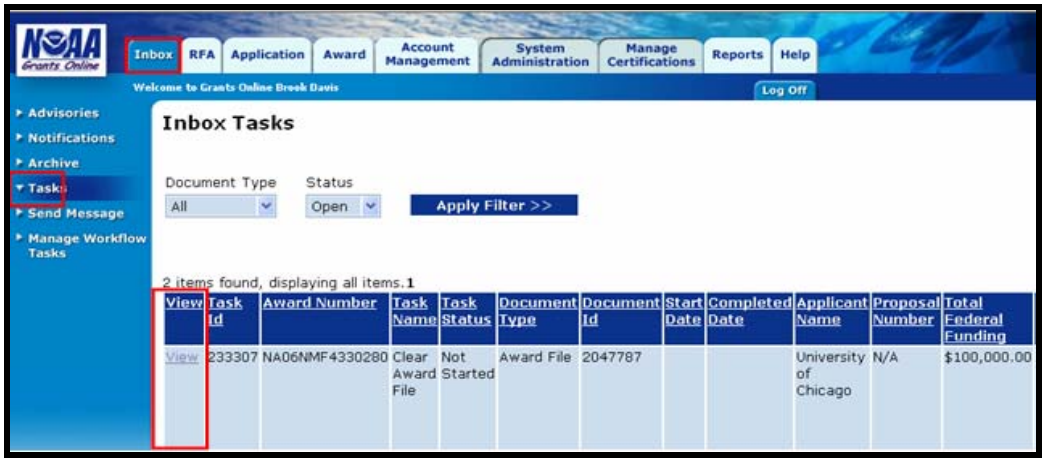


Step 4: Upon selecting the **View previous workflow history and comments** link, the **Workflow History Page** is displayed. The workflow history shows current tasks as well completed tasks. For our example below, the workflow indicates the Program Officer forwarded the Award file to the Grants Specialist on June 6, 2006. The Grants Specialist sent the Award File to OLIA on June 6, 2006 as well. In addition, any comments made by the users are also listed in the **User Comments** section.

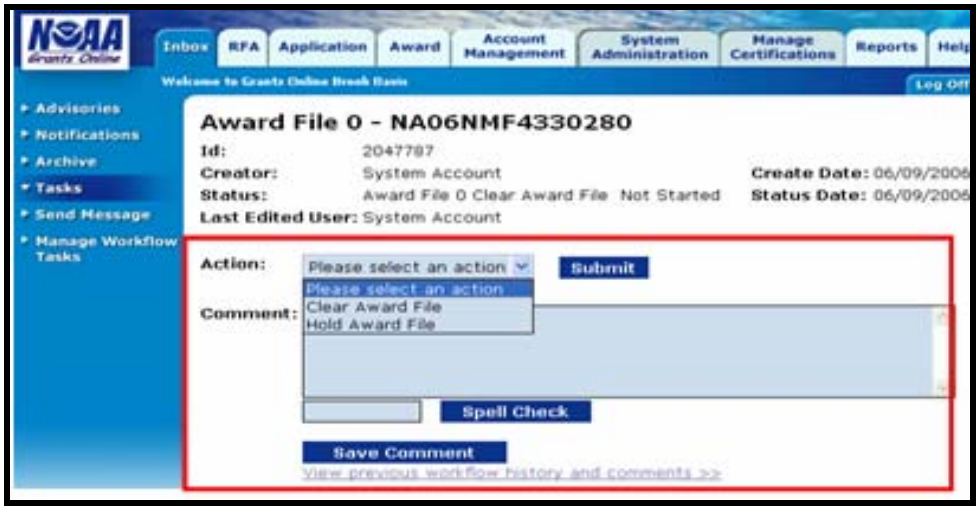


Holding the Award

Step 1: Upon review of the detailed Award information, to hold the Award file, select the **Inbox** tab followed by the **Tasks** link. Select the **View** link for the **Clear Award File** task.

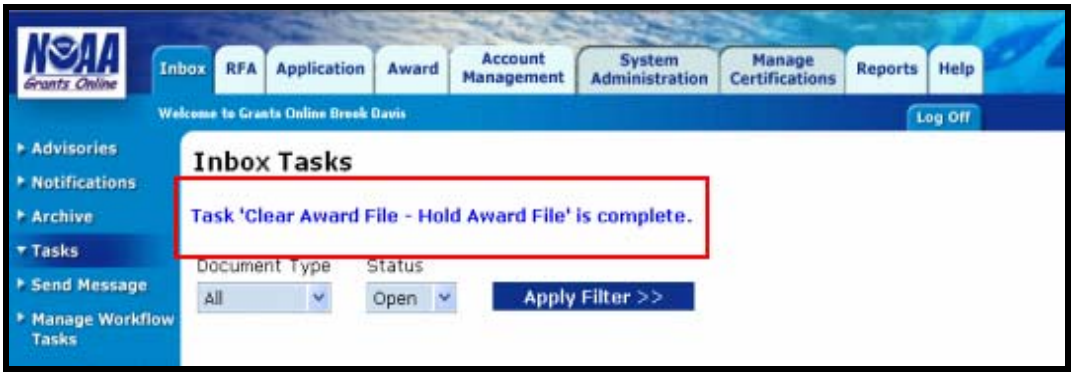


Step 2: The following screen is the **Task Launch** page. From the action drop down menu select **Hold Award File** followed by the **Submit** button. This action completes the task. Be sure to include your explanation(s) for holding the Award file in the COMMENTS field. Please note you must enter and save your comment before you can select an action. To view the previous workflow history and comments select the **View previous workflow and history comments** link (see step 5).

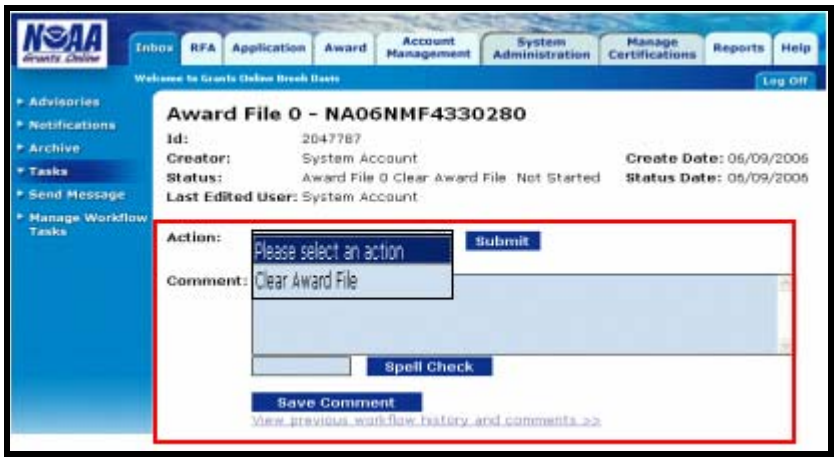


Step 3: Upon selecting the **Hold Award File** action, the following note is displayed:

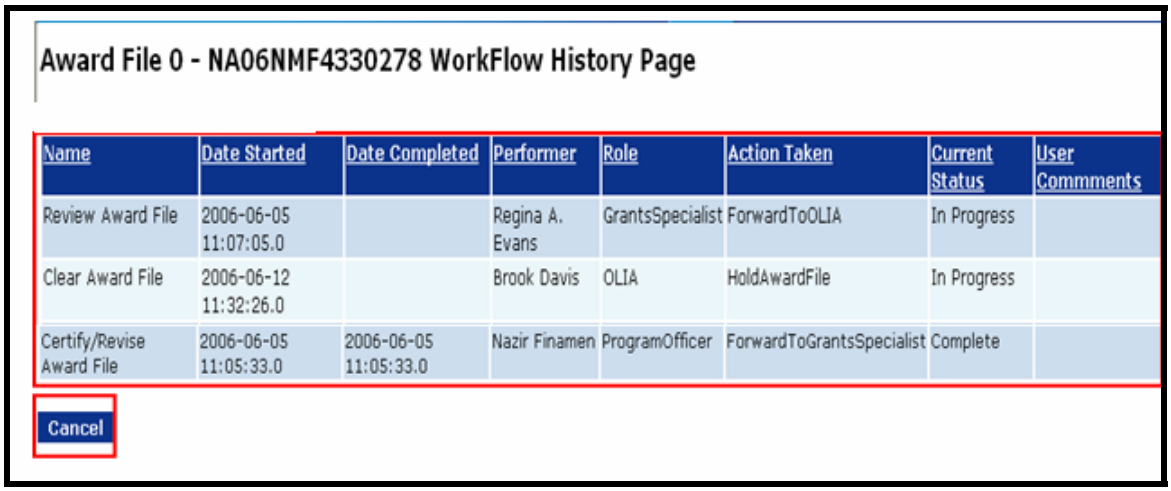
- **Task "Task Clear Award File – Hold Award File" is complete**



Step 4: The **Clear Award File** task remains in your inbox. From the action drop down menu, the only available option now is **Clear Award File** (see page 15 to review the process for the **Clear Award File** option).



Step 5: Upon selecting the **View previous workflow history and comments** link, the **Workflow History Page** is displayed. The workflow history shows current tasks as well completed tasks. For our example below, the workflow indicates the Program Officer forwarded the Award file to the Grants Specialist on June 6, 2006. The Grants Specialist sent the Award File to OLIA on June 6, 2006 as well. In addition, any comments made by the users are also listed in the **User Comments** section.



Award File 0 - NA06NMF4330278 WorkFlow History Page

Name	Date Started	Date Completed	Performer	Role	Action Taken	Current Status	User Commments
Review Award File	2006-06-05 11:07:05.0		Regina A. Evans	GrantsSpecialist	ForwardToOLIA	In Progress	
Clear Award File	2006-06-12 11:32:26.0		Brook Davis	OLIA	HoldAwardFile	In Progress	
Certify/Revise Award File	2006-06-05 11:05:33.0	2006-06-05 11:05:33.0	Nazir Finamen	ProgramOfficer	ForwardToGrantsSpecialist	Complete	

Cancel